

**Arizona State
Retirement System**



Online Enrollment

Employer User Guide

Revised July 2010

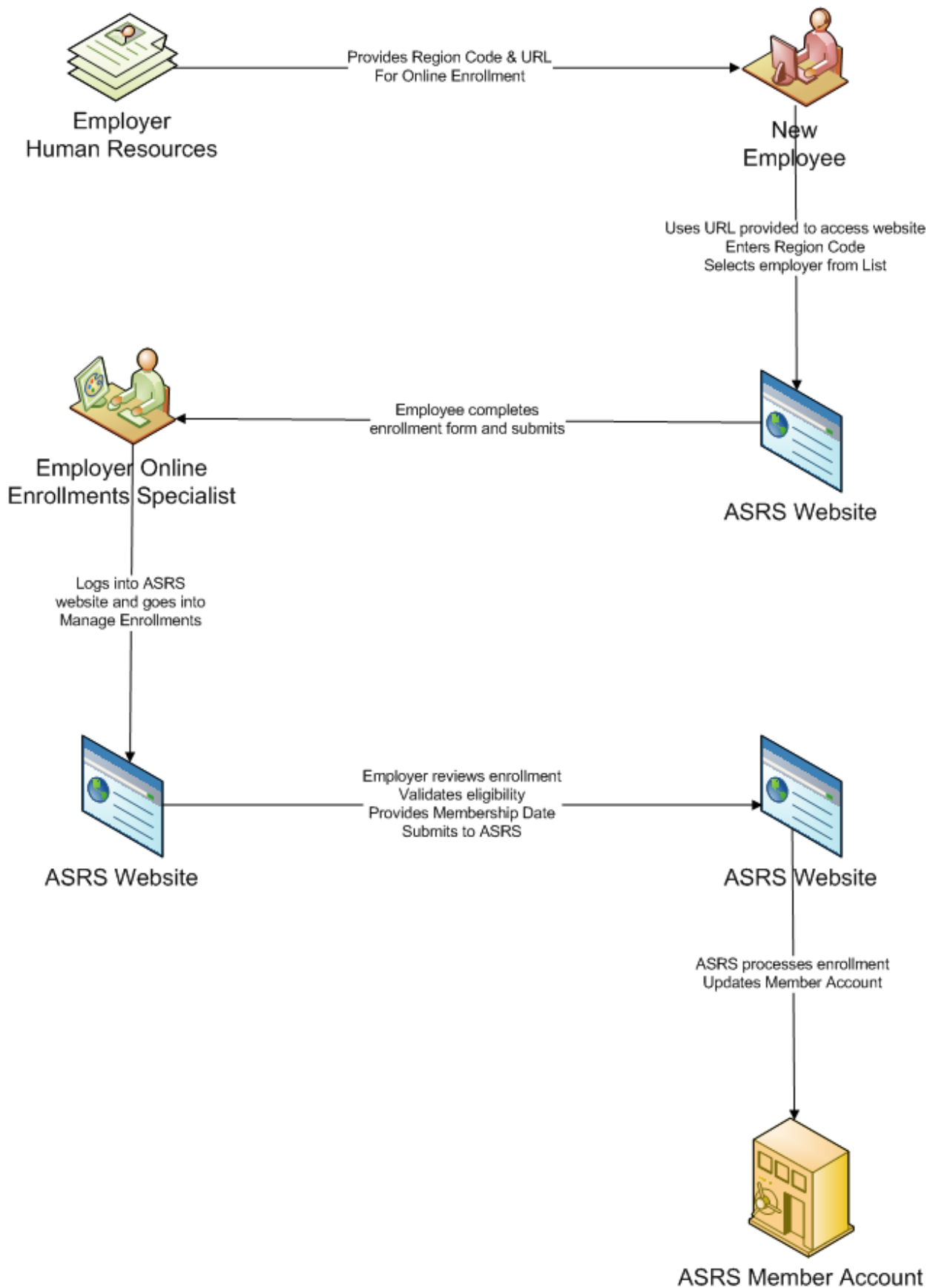
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Section One:

Online Enrollment Process

ONLINE ENROLLMENT PROCESS



ASRS Web User Administration

ASRS Support

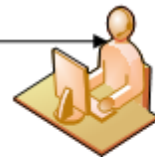
Creates new Employer Administrator
Notifies Employer Administrator to register



ASRS Support

Employer Administrator

Registers on the ASRS website
Receives email with link to login
Clicks on link and logs into ASRS website



Employer Administrator

CREATES

Employer Application Manager

Receives ASRS ID from Employer Administrator
Receives email with temporary password
Logs in at ASRS website
Maintains Employer Application Specialists



Application Manager

CREATES

Employer Application Specialist

Receives ASRS ID from Employer Administrator/
Application Manager
Receives email with temporary password
Logs in at ASRS website
Manages application functions



Application Specialists

Section Two:
Roles Defined

ASRS Employer Online Applications: *Roles*

EMPLOYER ADMINISTRATOR

An authorized Approver must designate an individual to act as the Employer Administrator for ASRS online applications. Only one Employer Administrator per employer is permitted at any time.

The Employer Administrator's responsibilities include:

- Act as the primary employer contact for the ASRS for access to online applications
- Register an employer account
- Assign and revoke the Application Manager roles
- View all users' information and roles
- Maintain, when necessary, user accounts:
 - Create a Web User account
 - Activate/deactivate a Web User account
 - Unlock a Web User account
 - Reissue a temporary password
- Other roles as required

APPLICATION MANAGER

The ASRS has two online applications – Online Contribution Reporting and Online Enrollment. Each of these applications may have only one Application Manager for that application at any time. Each Application Manager will have access only to their application-specific processes.

Each Application Manager's responsibilities include:

- Assign, maintain and revoke Application Specialist roles
- View all users' information and roles
- Maintain user accounts:
 - Create a Web User account
 - Activate/deactivate a Web User account
 - Unlock a Web User account
 - Reissue a temporary password
- Other roles as required

APPLICATION SPECIALIST

The Application Specialist is assigned certain roles by an Application Manager. The roles and functions are specific to the application to which the Application Specialist is assigned. For example, an Online Contribution Reporting Application Specialist may have a role to "Maintain a CSR" or "Maintain Payment;" an Online Enrollment Application Specialist may "Reissue a Region Code" or "Manage Enrollment Exceptions." An application may have an unlimited number of Application Specialists.

Each Application Specialist's responsibilities include:

- Perform application-specific functions and/or roles
- Maintain and update own user profile
- May have multiple roles

WEB USER

An Employer Administrator or Application Manager must create a Web User before they can assign a role. An employer may have an unlimited number of Web Users.

Each Web User's responsibilities include:

- Maintain and update own user profile
- View and download ASRS forms
- May be assigned roles (not required)

Section Three:

Employer Administrator Role

Employer Administrator Role (3 functions)

EMPLOYER ADMINISTRATOR FUNCTION #1: *Create Web User*

Step 1

To create a new web user, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu.

Step 4

At the bottom of the **Maintain Employer Users** page, click **Add a new Employer User**

Step 5

Enter the new user information in the form fields on the **Add New Employer Users** page and click

Save

The new user will now appear on the **Maintain Employer Users** page in a “pending” status and a temporary password will be emailed to the new user.

NOTES:

1. The ASRS ID is something that you create for the person (they can later change it). The ASRS ID can be up to 32 characters and may contain letters, numbers and most punctuation.
2. The ASRS ID is not included in the email with the temporary password. You will need to inform the person of the ASRS ID you created so that they can use that ID and the temporary password to login to the secure website.
3. To create a web user only, do not complete anything under Available Roles.
4. At the same time you create a web user, you may assign to them an Application Manager role, if available.

EMPLOYER ADMINISTRATOR FUNCTION #2: *Maintain Web User*

After a web user has been created, the following maintenance actions may be performed: reissue password, unlock, deactivate, and activate.

Step 1

To maintain a web user account, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you've arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu.

1.) TO ISSUE A NEW PASSWORD:

Find the user and click on the user's **ASRS ID**.

Click **New Password**

Click **Continue** on the **Employer User New Password Confirmation** page.

NOTE: The user will receive an email containing a new temporary password.

2.) TO UNLOCK AN ACCOUNT:

Find the user and click on the user's **ASRS ID**.

Click **Unlock**

Click **Continue** on the **Unlock Account Confirmation** page.

NOTE: This option will not appear if the user is not locked out of the account. The user will receive an email confirming their account has been unlocked. The user will be able to login using their ASRS ID and their previous password.

3.) TO DEACTIVATE A USER:

Find the user and click on the user's **ASRS ID**.

Click 

Click  on the **Deactivate Confirmation** page.

4.) TO ACTIVATE A USER:

Find the user and click on the user's **ASRS ID**.

Click 

Click  on the **Reactivation Confirmation** page.

NOTE: The user will receive an email containing a new temporary password.

Step 4

Click  to return to the user list.

EMPLOYER ADMINISTRATOR FUNCTION #3: *Assign Application Manager Role*

PLEASE NOTE: Only ONE person can be assigned to an Application Manager Role for each application. However, a person may serve in the Application Manager Role for more than one application (i.e., both Contribution Reporting and Online Enrollment). Only the Employer Administrator may assign/re-assign an Application Manager Role. And, an Application Manager Role is the only role that the Employer Administrator may assign/re-assign.

To Assign Application Manager Role to Another User:

Step 1

To assign a Manager Role, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click

Login to Secure Home

Step 3

After you have arrived at the **Employer Home** page, select

Maintain Employer Users

from the left-hand navigation menu.

Step 4

From the list provided on the **Maintain Employer Users** page, click on the user's **ASRS ID**.

Step 5

Under **Application Groups**, select one or more of the following roles:

- ☐ File Upload Reporting Manager (if available)
- ☐ Web Reporting Manager (if available)
- ☐ Online Enrollments Manager

Click

Save Group Changes

The Manager role will now appear under the user's **Application / Group Information** on the **Maintain Employer Users** page.

NOTE: If no items appear under **Available Groups**, this means that another person has been assigned to the Application Manager role(s). This role must be de-selected from the previous user's Available Roles before it can be reassigned to another user.

To Assign Application Manager Role to Self*:

** If you are also the Employer Administrator*

Step 1

To assign a Manager Role to yourself, visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Edit My Profile** from the left-hand navigation menu.

Step 4

Under **Application Groups**, select one or more of the following roles:

- ☐ File Upload Reporting Manager (if available)
- ☐ Web Reporting Manager (if available)
- ☐ Online Enrollments Manager

Enter **Current Password** to confirm you want to change your profile.

Click **Save**

NOTE: If no items appear under **Available Groups**, this means that another person has been assigned to the Application Manager role(s). This role must be de-selected from the previous user's Available Roles before it can be reassigned to yourself.

Also, links to perform the newly-assigned functions will not appear as part of your profile until you log out and log back in with your **Employer ASRS ID**.

Section Four:

Online Enrollments Manager Role

Online Enrollments Manager Role (*4 functions*)

ONLINE ENROLLMENTS MANAGER FUNCTION #1: *Create Web User*

The process is the same as outlined under the **Employer Administrator Role** on page 9.

ONLINE ENROLLMENTS MANAGER FUNCTION #2: *Maintain Web User*

The process is the same as outlined under the **Employer Administrator Role** on page 10.

ONLINE ENROLLMENTS MANAGER FUNCTION #3: *Assign Application Specialist Role*

PLEASE NOTE: An unlimited number of people may be assigned to an Application Specialist Role, and a person may have more than one Application Specialist Role. Only the Application Manager may assign/re-assign an Application Specialist Role within an application (i.e., Contribution Reporting or Online Enrollments). And, the Application Specialist Roles associated with that application are the only roles that the Application Manager may assign/re-assign.

To Assign Application Specialist Role to Another User:

Step 1

To assign a Process Enrollments role, please visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu.

Step 4

From the list provided on the **Maintain Employers Users** page, click on the user's **ASRS ID**.

Step 5

Under **Application Groups**, select:

☐ Process Enrollments

Click **Save Group Changes**

NOTE: The new role will now appear under the user's **Application / Group Information** on the **Maintain Employer Users** page.

To Assign Application Specialist Role to Self*:

** If you are also the Application Manager*

Step 1

To assign a Process Enrollments role to yourself, visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Edit My Profile** from the left-hand navigation menu.

Step 4

Under **Application Groups**, select the following role:

☐ Process Enrollments

Enter **Current Password** to confirm you want to change your profile.

Click **Save**

NOTE: Links to perform the newly-assigned functions will not appear as part of your profile until you log out and log back in with your employer **ASRS ID**.

ONLINE ENROLLMENTS MANAGER FUNCTION #4: *Enrollment Regions (5 sub-functions)*

Enrollment Regions enable employers to organize and manage enrollments by providing a way to determine which new hires receive which code and which specialists manage which enrollments. A region may be defined in any manner that is helpful. For example, a “region” may be defined for names beginning A-J, for different office locations, or for different staff classifications such as certified versus classified staff.

PLEASE NOTE: The Online Enrollments Manager is the only role that may create, rename, merge, and delete a region and assign specialists to a region. More than one specialist may be assigned to a region. You must create at least one region.

1.) CREATE A REGION AND ASSIGN A SPECIALIST TO A REGION:

Step 1

To create a region, please visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click

Login to Secure Home

Step 3

After you have arrived at the **Employer Home** page, select

Enrollment Regions

from the left-hand navigation menu.

Step 4

Below the table on-screen, click

Create a Region

Step 5

Type in the name of your choice and click

Create and Issue Code

From the next screen, click

Back to Enrollment Regions

Step 6

Find the newly created region and under **Assigned Processors**, click

Change

Step 7

From the **Manage Users for Region** page, under the “Available” column, select the user(s) you wish to assign and click

Add Users

NOTE: If there are no users listed under the “Available” column, you must first assign the Process Enrollments role to a user and they must be in a “registered” (not “pending”) status, meaning they have logged on at least once.

Step 8

Click **Back to Enrollment Regions**

2.) TO DELETE A REGION:

Step 1

From the **Enrollment Regions** screen you will see a table of enrollment regions. Click **Delete** beside the region you wish to remove.

You will receive a confirmation screen verifying the name and code of the region deleted.

NOTE: You cannot delete a region that has “entered” or “saved” enrollments. You must either process these enrollments before deleting that region or use the **Merge Regions** function to move the enrollments to another region.

Step 2

Click **Back to Enrollment Regions**

3.) TO MERGE REGIONS:

Step 1

On the bottom of the **Enrollment Regions** screen click **Merge Regions**

Step 2

Using the **Source Region** drop-down menu, select the name of the region you wish to merge into another (deleting the “source region” in the process).

Then, using the **Target Region** drop-down menu, choose the region you wish to merge into.

Click **Merge Regions**

Step 3

Click [Back to Enrollment Regions](#)

4.) TO REISSUE A REGION CODE:

The code given to new ASRS members by employer representatives is unique to the employer. It assists the ASRS in verifying the employer for whom the newly enrolling member works. From time to time, employers may wish to update the code or generate (reissue) a new one for security reasons.

Step 1

From the **Enrollment Regions** screen you will see a table of regions. Click **Reissue Code** beside the region for which you wish to change the code.

You will receive a confirmation screen verifying the name of the new region and the new code.

Step 2

Click [Back to Enrollment Regions](#)

5.) TO RENAME A REGION:

Step 1

From the **Enrollment Regions** screen you will see a table of regions. Click **Rename** beside the region you wish to change.

Step 2

Type in the new name and click **Rename**.

You will receive a confirmation screen verifying both the former and the new name of the region.

Step 3

Click [Back to Enrollment Regions](#)

Section Five:

Online Enrollments Specialist Role

Online Enrollments Specialist Role (*4 functions*)

ONLINE ENROLLMENTS SPECIALIST FUNCTION #1: *Reissue a Region Code*

The process is the same as listed under the **Application Manager Role** -“Reissue a Region Code” on page 20.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #2: *Provide New Hire/Eligible Member with Enrollment Instructions*

Step 1

To find the URL and region code to give to a new hire, visit the ASRS website at www.azasrs.gov and hover over the **Employer** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Enrollment Regions** from the left-hand navigation menu.

Step 4

Click on the **Document** link for a sample communication to the employee.

The employees will need a URL to direct them to the page where they will begin the enrollment process. The employee will also need the appropriate region code to enter in order to identify their current employer.

Step 5

Email or give the information to the employee.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #3: *Manage Enrollments*

Step 1

To manage enrollments, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click

Login to Secure Home

Step 3

After you have arrived at the **Employer Home** page, select

Manage Enrollments

from the left-hand navigation menu.

Step 4

Select the appropriate **Region Code** from the drop down menu and click

Update Region

. The region code will populate under “Current Region.”

NOTE: You must click on “Update Region” to populate the fields. If this action is not completed, enrollments will not populate when “Find Enrollments” is selected.

Step 5

Click

Find Enrollments

NOTE: You may opt to find a specific enrollment by entering the employee’s SSN. Or you may opt to find only enrollments in an “entered” status (i.e., those that have been submitted by employees). Or you may opt to find only those in a “rejected” status (i.e., the ASRS attempted to match the enrollment but found a critical data issue).

Step 6

To select an employee, click on the

SSN

Step 7


Under **Employee Data**, review the information entered by the employee.

NOTES: If any information is incorrect, you may click on “Update” and correct the information. Or, you may opt to “Terminate” the enrollment and request the employee enter a new one. If you open an enrollment in a “Rejected” status, a message will appear in red near the top indicating the error.

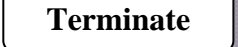

Step 8

Under **Employer Data**, click on the “Member Eligibility” box to confirm the employee’s eligibility for ASRS participation.


Type in the “Membership Date.”

Click  if you would like to save any changes but do not want to submit it to the ASRS yet.

OR...

Click  to end the enrollment. On the next page, click  to confirm.

OR...

Click  to send the enrollment to the ASRS.

On the next page, click  to confirm.

NOTE: Submitted and/or Terminated enrollments will no longer populate when “Find Enrollments” is selected.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #4: *Manage Enrollment Exceptions*

This function allows you to view all employees for whom the ASRS has received contributions but no enrollment, and all employees for whom the ASRS has received an enrollment but no contributions. Employees will not appear on this list once the ASRS has been able to “match” an enrollment and contributions. This process may take several weeks from the employee’s hire or eligibility date to complete.

Step 1

To manage enrollment exceptions, visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **ASRS ID** and **password**.

Click **Login to Secure Home**

Step 3

After you have arrived at the **Employer Home** page, select **Manage Enrollments** from the left-hand navigation menu.

Step 4

Select the appropriate **Region Code** from the drop down and click **Update Region**. The region code will populate under “Current Region.”

NOTE: You must click on the “Update Region” to populate the fields. If this action is not completed, enrollments will not populate when “Find Exceptions” is selected.

Step 5

Click **Find Exceptions**

NOTES: You may opt to find only unmatched enrollments (i.e., an employee with an enrollment but no contributions). Or you may opt to find only unmatched contributions (i.e., an employee with contributions but no enrollment).

The Exceptions Report shows unmatched contributions for all regions associated with the employer as the ASRS system only processes contributions by employer number and not by region codes.

Step 6

Click **Export to PDF** to save or print the report.

NOTE: If an enrollment was submitted in error, you may choose to “Terminate” a record with an enrollment but no contributions from this screen by clicking on the box in the last column and clicking on “Terminate Selected.”

This selection box does not appear on records of employees for whom the ASRS has received contributions but no enrollments. Contributions cannot be “terminated” through this application. If contributions were submitted in error, adjustments should be made through the contribution reporting process.

Addendum:

Employee - Enroll Online

Employee - Enroll Online

Step 1

To complete an ASRS Enrollment Form, please visit the ASRS website by going to the web address (URL) provided to you by your employer Human Resources staff.

Step 2

Enter the **Region Code** (ex. 02N00019) provided to you by your employer Human Resources staff.

Click

Enter

Step 3

Select your **Employer Name** from the drop-down menu and click

Enter

Step 4

Enter information in requested fields and click

Confirm

NOTE: Messages in red will appear at the top if required fields are missing information.

Step 5

Review the information and click

Send to Employer

NOTE: If you need to make corrections, click “Make Corrections” instead of “Send to Employer” and return to the previous step.

Step 6

Review information about when and how to submit ASRS Beneficiary information to the ASRS.